

erwin DI Suite

Business Glossary Manager

Quick Start User Guide – v9.3

Getting Started

- ✓ About Business Glossary Manager
- ✓ Quick Access Section
- ✓ GUI and Screen Layout

About Business Glossary Manager


The Business Glossary Manager Enables business users to create, manage and collaborate on common business vocabulary across the organization Supports regulatory compliance, data governance, and data stewardship initiatives by governing business vocabulary terms and enabling lineage maps showing how semantic definitions related to physical data dictionaries, data mappings, lineage of federated data and other business artifacts such as requirements, test cases and more..

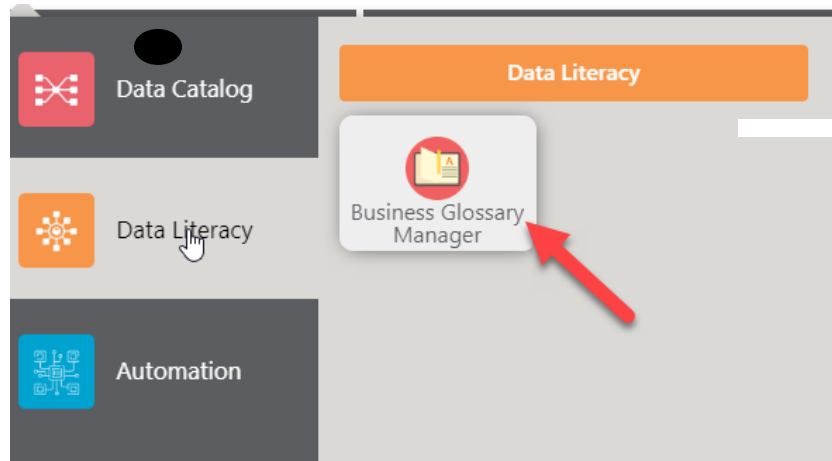
Quick Access Section

Business Glossary Manager

- ✚ About Business Glossary Manager [Click](#)
- ✚ Glossary Workspace [Click](#)
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GUI and Screen Layout

Click on the Launchpad icon  on the top left corner and click on "Business Glossary Manager" icon in the Launchpad menu to access the Business Glossary Manager module.



The Business Glossary Manager Dashboard displays upon accessing the module with following information.

- Glossary Work Space with the complete information (Below Image)

Glossary Workspace: It gives you the complete information about the Module, Including No. of Catalogs, Business Terms, Data Stewards, Associated Business Terms, Associated Technical Metadata, Published Terms, Glossary Status and also The Catalog Summary.

Mapping Manager | Business Glossary Manager

Glossary Workspace

- Business Terms
- Business Policies
- Business Rules
- Stewardship Goals

51 Catalogs

2706 Business Terms

5 Data Steward

42 Associated Business Terms

27 Associated Technical Metadata

0 Associated Policies

2704 Published Terms

Business Terms Summary

#	Business Term	Definition	Description	Status	Classification	Published	Associate Business Terms	Associate Technical Metadata	Associate Business Policies	Rich Media Library	Data Steward	Catalog	Catalog Hierarchy	Options
1	Balance Sheet	A financial statement of an individual, company or organisation, which shows assets and liabilities	A financial statement of an individual, company or organisation, which shows assets and liabilities	Approved			0	0	0	0		Business and Management	Business and Management	
2	balance sheet	The Balance Sheet is one of the three essential measurement reports for the performance and health of	The Balance Sheet is one of the three essential measurement reports for the performance and health of	N/A			0	0	0	0		Miscellaneous	Miscellaneous	

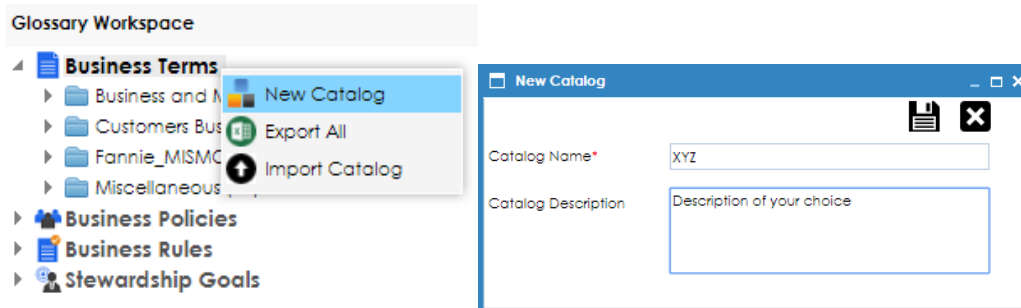
Glossary Status in Alphabetical View

134

- Pending Review
- Pending Approval
- Approved
- Published
- Rejected
- N/A

Reports from 1 to 20 of 142

Create new catalog: Right click on Business Terms node and select New Catalog. Enter the required fields like Catalog name, Description and click save. We can also Export this catalog and Import Catalog as shown below.



Business Terms: A globally defined terms which are the representation of your business usage. You can define

Business Terms: Click on any catalog to see the list of business terms available in it.

Ex: Click on "ADS" as shown below

Mapping Manager v8.2 | Business Glossary Manager

Search Keyword

Glossary Workspace

- Business Terms
 - ADS (71)
 - Business and Management (4)
 - Customers Business (43)
 - Fannie_MISMO (22)
 - Miscellaneous (2)
 - Sales (177)
- Business Policies
- Business Rules
- Stewardship Goals

Glossary Status - ADS

67

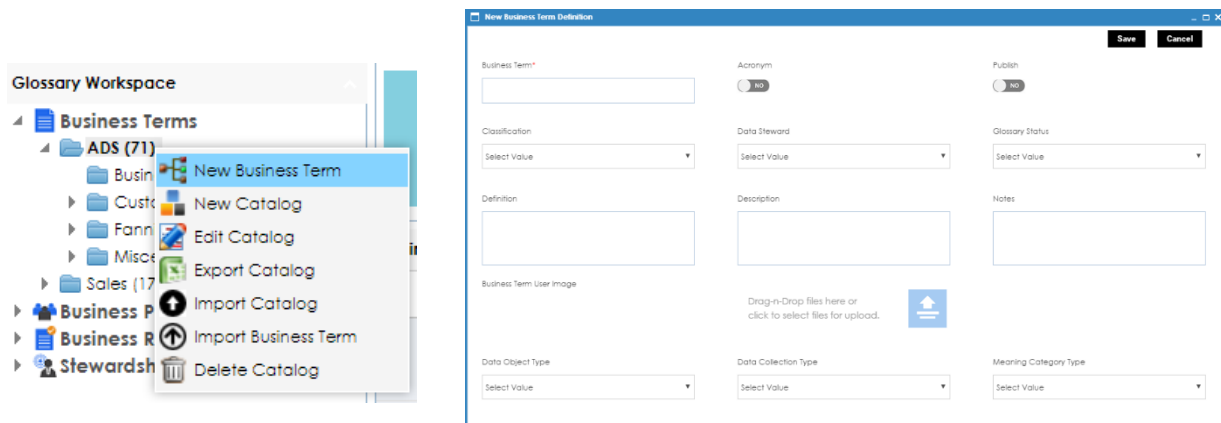
- Pending Review
- Pending Approval
- Approved
- Published
- Rejected
- N/A

Business Terms Summary

#	Business Term	Definition	Description	Status	Classification	Published	Associated Business Terms	Associated Technical Metadata	Associated Business Policies	Rich Media Library	Data Steward	Catalog	Catalog Hierarchy	Options
1	Balance Sheet	A financial statement of an individual, company or organisation, which shows assets and liabilities	A financial statement of an individual, company or organisation, which shows assets and liabilities	Approved		✓	0	0	0	0		Business and Management	ADS → Business and Management	
2	balance sheet	The Balance Sheet is one of the three essential measurement reports for the performance and health of	The Balance Sheet is one of the three essential measurement reports for the performance and health of	N/A		✓	0	0	0	0		Miscellaneous	ADS → Miscellaneous	
		Describes a long term	Describes a long term											


Records from 1 to 20 of 71

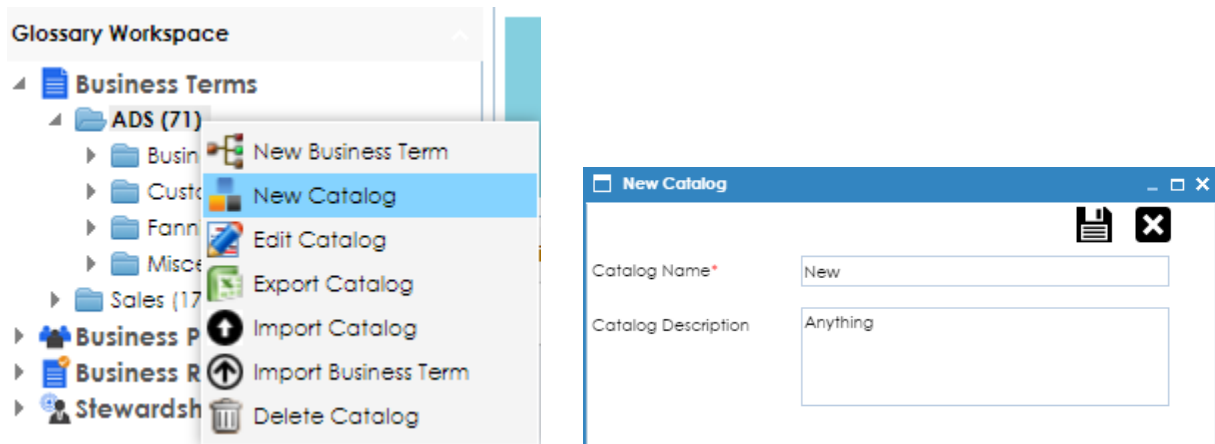
Create New Business Term: Create a new Business Term of your choice by Right clicking on the newly created Catalog as shown below. Give a name and required details and save your Business term.



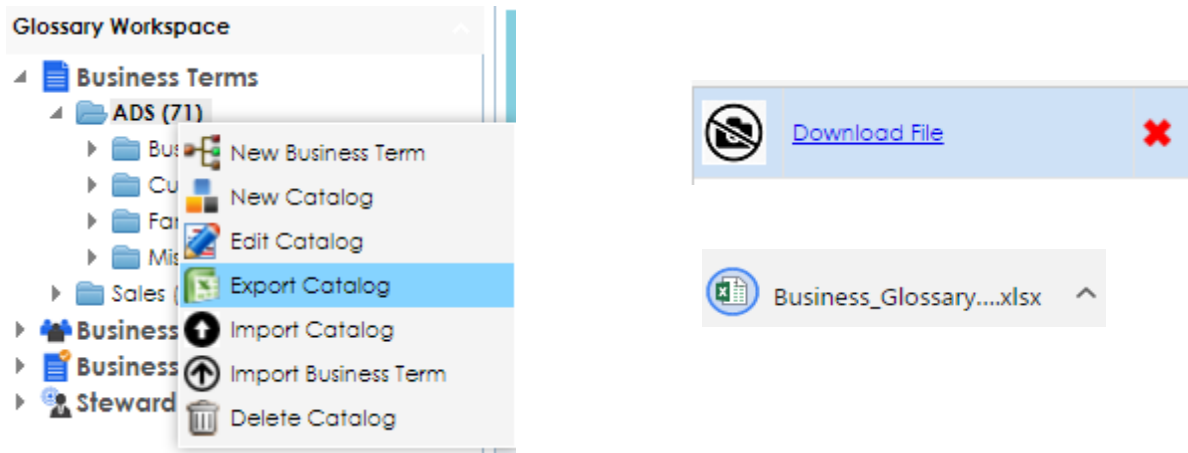
After you select the New Business term, the screen will show you the New Business Term Definition as below which includes,

- Business Term Name(Name of your Choice) {Mandatory}
- Acronym(Select if it is Acronym or not)
- Publish(Publish this Business Term)
- Classification (You can classify weather it is a Master, Derived, Reference, Transactional or Operational etc. in the dropdown)
- Data Steward(Select your Data Steward in the drop down)
- Glossary Status(Define its Status in the Drop down)
- Definition, Description and Notes
- Business Term user image(Upload any image of your preference)
- Data Object Type(You can select the data object type in the drop down)
- Data Collection Type(Select the data collection type in the drop down)
- Meaning Category Type (Select weather it is a Conceptual, logical or physical in the drop down)

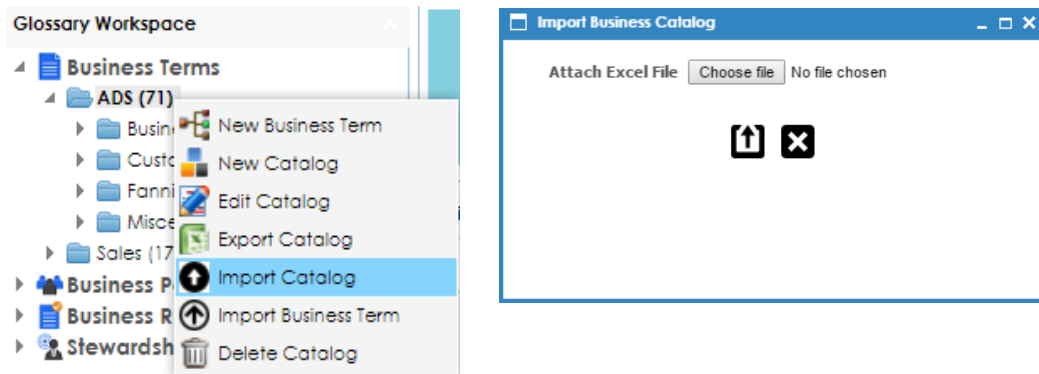
Create New Catalog: Right Click on Glossary Catalog, Select New Catalog (Below left image), add Name and description to it (Right Image) and Save  icon



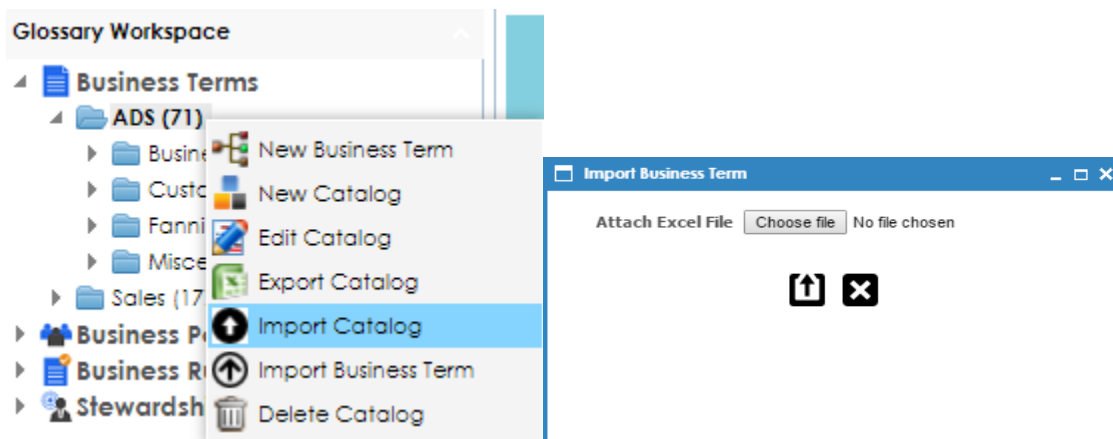
Export Catalog: Right Click on the Glossary Catalog, You can see “Export Catalog” option to download the Catalog. You can see the downloaded file on the right hand side.



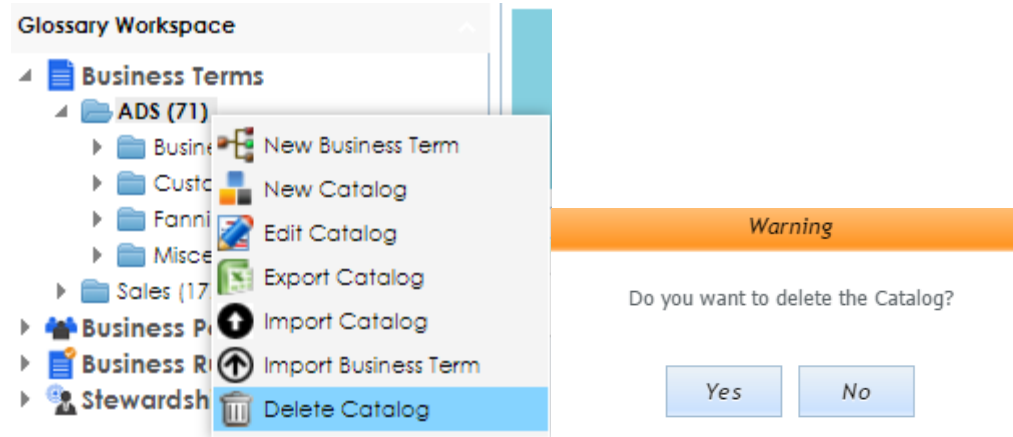
Import Catalog: Right Click on Glossary Catalog to see Import Catalog to Import from your exiting file. You can choose your Catalog Destination file and attach this to the Glossary catalog as shown below.



Import Business Term: You can also import business term from your existing enterprise business terms.



Delete Catalog: Delete the catalog by clicking on the delete catalog option as shown below.



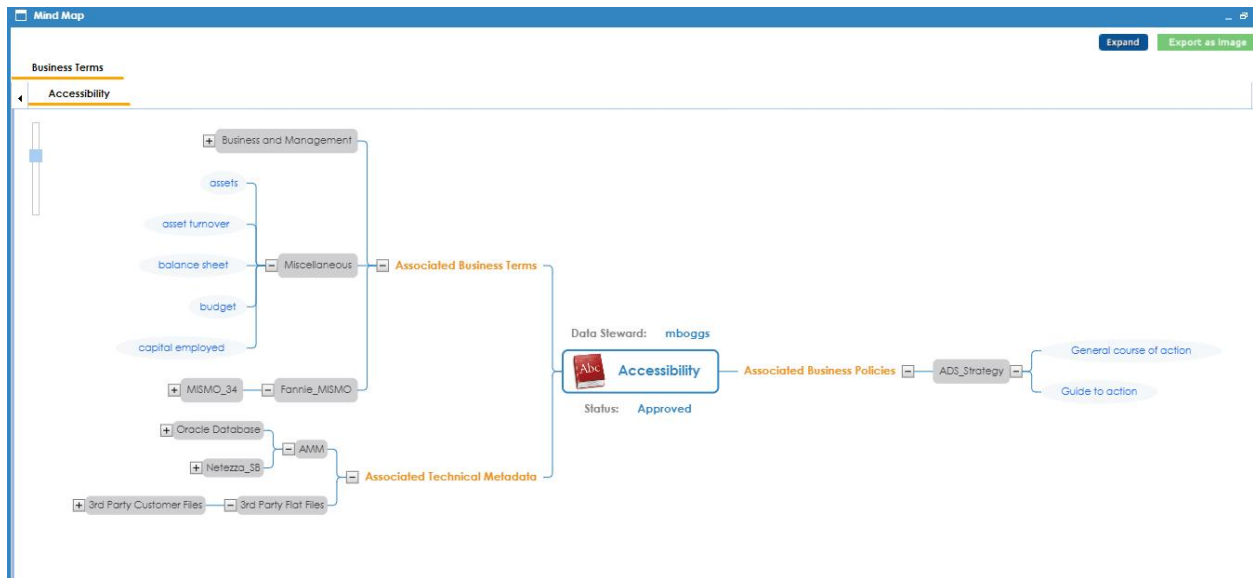
Business Term Properties:


Mind Map: After you create the Business Term, you can now know how this business term is being connected/linked with. And you can also export this report as image. In this case "Accessibility" is the Business term as shown below. This Mind Map report gives you the Status, Data Steward Name, Technical Metadata, and also associated business Terms linked to it.

The screenshot shows the 'Business Terms Summary' table. Above the table are summary cards for various categories: Catalogs (0), Business Terms (55), Data Steward (5), Associated Business Terms (34), Associated Technical Metadata (30), Associated Policies (2), and Published Terms (55). The table has columns for Business Term, Definition, Description, Status, Classification, Published, and various associated counts. The first row is for 'Accessibility', which is highlighted. In the 'Options' column for this row, the 'Mind Map' icon (a document with a network diagram) is highlighted with a red box. A red arrow points from this box to a label 'Mindmap' in a separate box on the right. Below the table is a legend for 'Glossary Status' with categories like Pending Review, Pending Approval, Approved, Published, Rejected, and N/A.

#	Business Term	Definition	Description	Status	Classification	Published	Associated Business Terms	Associated Technical Metadata	Associated Business Policies	Rich Media Library	Data Steward	Catalog	Catalog Hierarchy	Options
1	Accessibility	Refers to the state by which an audience is able to receive, understand and act upon communications a	Refers to the state by which an audience is able to receive, understand and act upon communications a	Approved	Master	✓	18	9	2	2	[Steward]	Business and Management	Business and Management	[Mind Map] [Export] [Edit] [Delete] [Refresh]
2	Accretion	Growth or increase in the value or amount of something	Growth or increase in the value or amount of something	Pending Review		✓	5	4	0	0	[Steward]	Business and Management	Business and Management	[Mind Map] [Export] [Edit] [Delete] [Refresh]
3	Actuals	Real costs, sales, etc., that have occurred, rather than estimations	Real costs, sales, etc., that have occurred, rather than estimations	Approved		✓	0	0	0	0	[Steward]	Business and Management	Business and Management	[Mind Map] [Export] [Edit] [Delete] [Refresh]


Records from 1 to 20 of 55



Edit Business Term: Click on the pencil icon  to edit the Business term. Once you click on the edit icon you can now see the screen as shown below.

You can now make Edits to this Business Term ex: "Accessibility" and save the changes accordingly.

Associated Business Terms: You can link many Business terms to a single business term by using this feature. Select Business terms from the drop down as shown in the below second image which can be tied to your

required Business term. Use  this icon to associate Business terms.

View Business Term			
Business Term Details	Associations	Additional Details	Rich Media Library
Business Terms	Technical Metadata	Business Policies	Valid Values
Upstream Associations			
#	Business Term	Associated Business Term	Relationship
1	Accessibility	Accretion (Business and Management)	
2	Accessibility	Actuals (Business and Management)	
3	Accessibility	Advertising (Business and Management)	
4	Accessibility	Amortize (Business and Management)	
5	Accessibility	Balance Sheet (Business and Management)	
6	Accessibility	Balloon (Business and Management)	
Records from 1 to 18 of 18			
Downstream Associations			
#	Business Term	Associated Business Term	Relationship
1	Salary (Business and Management)	Accessibility	
Records from 1 to 1 of 1			

Business Term Association				
Business Terms				
Business and Management (55)				
Customers Business (2152)				
Fannie_MISMO (238)				
Miscellaneous (13)				
#	Select All	Business Term Name	Hierarchy	Relationship
1	<input type="checkbox"/>	Accessibility	Business and Management	
2	<input checked="" type="checkbox"/>	Accretion	Business and Management	
3	<input checked="" type="checkbox"/>	Actuals	Business and Management	
4	<input type="checkbox"/>	Adjunct	Business and Management	
5	<input checked="" type="checkbox"/>	Advertising	Business and Management	
6	<input checked="" type="checkbox"/>	Amortize	Business and Management	
7	<input checked="" type="checkbox"/>	Balance Sheet	Business and Management	
8	<input checked="" type="checkbox"/>	Balloon	Business and Management	
9	<input checked="" type="checkbox"/>	Bancassurance	Business and Management	
10	<input checked="" type="checkbox"/>	Bank Run	Business and Management	
11	<input checked="" type="checkbox"/>	Capital	Business and Management	

Select multiple Business Terms from the dropdown as shown in the above image and save it accordingly.

Associated Technical Metadata: You can also attach the metadata for your Business term by using this feature. Put the Business term in edit mode, Select edit Associate Business Term and Start attaching your metadata information to your Business Term as shown in the below second image and save it.Done.

View Business Term				
Business Term Details	Associations	Additional Details	Rich Media Library	Collaboration Center
Business Terms	Technical Metadata	Business Policies	Valid Values	
#	Column Name	Table Name	Environment Name	System Name
1	City	dbo.Contact	Oracle Database	AMM
2	Company	dbo.Contact	Oracle Database	AMM
3	BOOKED_AMT	ADMIN.ACCT_PRFM_FACT	Netezza_S8	AMM
4	BOOK_VAL	ADMIN.ACCT_PRFM_FACT	Netezza_S8	AMM
5	ADVNC_DT	ADMIN.ACCT_PRFM_FACT	Netezza_S8	AMM
6	ACCT_STAT_CD	ADMIN.ACCT_PRFM_FACT	Netezza_S8	AMM
7	ACCT_OPN_DT	ADMIN.ACCT_PRFM_FACT	Netezza_S8	AMM
8	AccountCodeAlternateKey	DimAccount	3rd Party Customer Files	3rd Party Flat Files
9	EmployeeKey	DimEmployee	3rd Party Customer Files	3rd Party Flat Files

Click on associate technical metadata icon to go to metadata library. Search for the metadata and associate the required metadata and save accordingly as shown below.

Metadata Selection Grid

System Name: Environment Name: Table Name: Column Name:

Exact Search: ☐ NO Starts With: ☐ NO Ends With: ☐ NO

Search Results

#	Column Name	Table Name	Environment Name	System Name
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	first_name,last_name,middle	20Cols	CSV_Env	CSV_Sys
<input type="checkbox"/>	ACCT_GRP_ID	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input type="checkbox"/>	ACCT_NUM	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input type="checkbox"/>	ACCT_OPN_DT	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input type="checkbox"/>	ACCT_STAT_CD	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input type="checkbox"/>	ADVNC_DT	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input type="checkbox"/>	BOOK_VAL	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input type="checkbox"/>	BOOKED_AMT	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM

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Already Associate Metadata

#	Column Name	Table Name	Environment Name	System Name
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	City	dbo.Contact	Oracle Database	AMM
<input checked="" type="checkbox"/>	Company	dbo.Contact	Oracle Database	AMM
<input checked="" type="checkbox"/>	BOOKED_AMT	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input checked="" type="checkbox"/>	BOOK_VAL	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input checked="" type="checkbox"/>	ADVNC_DT	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input checked="" type="checkbox"/>	ACCT_STAT_CD	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input checked="" type="checkbox"/>	ACCT_OPN_DT	ADMIN.ACCT_PRFM_FACT	Netezza_SB	AMM
<input checked="" type="checkbox"/>	AccountCodeAlternate	DimAccount	3rd Party Customer Files	3rd Party Flat Files

Records from 1 to 9 of 9

Associate Business policies: We can also associate Enterprise Business Policies to the Business Term as shown below.

View Business Term

Business Term Details **Associations** Additional Details Rich Media Library Collaboration Center History

Business Terms Technical Metadata **Business Policies** Valid Values

#	Policy Name	Definition	Description	Catalog Name	Catalog Hierarchy	Data Steward
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	General course of action	It is a means of putting a policy into effect within certain time limits	It is a means of putting a policy into effect within certain time limits	ADS_Strategy	ADS_Strategy	
2	Guide to action	Deals with those decisions which have not been encountered before in quite the same form, for which	Deals with those decisions which have not been encountered before in quite the same form, for which	ADS_Strategy	ADS_Strategy	

After clicking on the Associate Business Policies icon, a dropdown with the list of Policies appear on the screen as shown below. Select the required Policies to be attached and save it accordingly.

Business Policies Association

Business Policies

- ADS_Strategy (5)

#	Select All	Policy Name	Definition	Description
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	<input checked="" type="checkbox"/>	General course of action	It is a means of putting a policy into effect within	It is a means of putting a policy into effect within
2	<input checked="" type="checkbox"/>	Guide to action	Deals with those decisions which have not been	Deals with those decisions which have not been
3	<input type="checkbox"/>	Policies statements	Strategies are specific actions suggested to ach	Strategies are specific actions suggested to ach
4	<input type="checkbox"/>	Policy decision	It deals with crucial decisions, whose implement	It deals with crucial decisions, whose implement
5	<input type="checkbox"/>	Strategic Management	It offers guidelines for managers to take appropr	It offers guidelines for managers to take appropr

Valid Values: We can also associate valid values (Code Sets) to the Business Term as shown below.

View Business Term

Business Term Details **Associations** Additional Details Rich Media Library Collaboration Center History

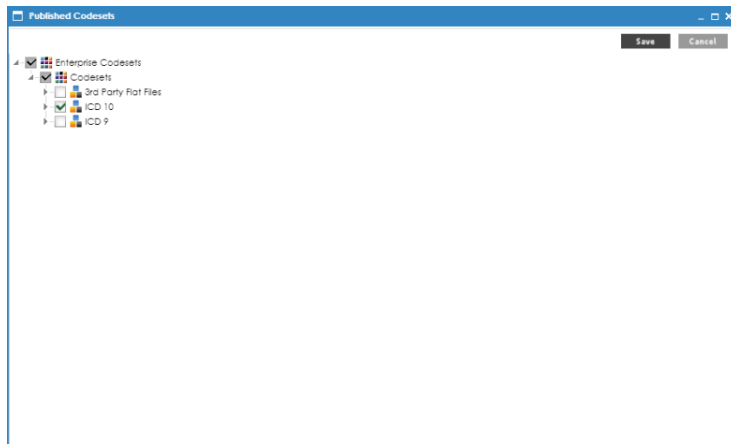
Business Terms Technical Metadata Business Policies **Valid Values**

Assign/Remove Codesets **Export to Excel**

#	Code Name	Code Value	Code Description	System Name/Environment	Codeset Name	Version	Category Hierarchy	Created By	Created Date	Assign/Remove Codesets	Date
1	Respiratory tuberculosis	A15		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
2	Respiratory tuberculosis	A16		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
3	OTuberculosis of nerv	A17		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
4	Tuberculosis meningiti	A17.0		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
5	Meningeal tuberculor	A17.1		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
6	Other tuberculosis of	A17.8		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
7	Tuberculosis of nervo	A17.9		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
8	Tuberculosis of other	A18		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
9	Miliary tuberculosis	A19		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
10	TTuberculosis of bone	A18.0		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
11	Tuberculosis of genito	A18.1		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
12	Tuberculous peripher	A18.2		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
13	Tuberculosis of intesti	A18.3		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0
14	Tuberculosis of skin an	A18.4		EDW	Tuberculosis	1.01	ICD 10	Administrator	2015-03-10 12:43:10.0	Administrator	2015-03-10 12:43:10.0

Records from 1 to 18 25 rows per page

Click on assign/remove codesets to go to the Published codesets and select the required codesets and save it accordingly as shown below.



Additional Details: The tool provides ten user defined fields to provide more context to the business term. Use the edit icon and make changes to the fields and save it accordingly.

Rich Media Library: We can also attach rich media like (text documents, audio, video files etc.) to the business term as shown below. Use (+) to add the required documents.

#	Document Name	Document Description	Document Owner	Document Status	Document Type	Document Link	Created By	Created Date	Modified By	Modified Date	Preview	Edit	Delete
1	test			In Progress		http://www.thereg.co.uk	Administrator	03/27/2017 20:53:04	Administrator	03/27/2017 20:53:04			
2	DocX		Praveen	In Progress	xlsx		Administrator	09/28/2017 15:27:43	Administrator	09/28/2017 15:27:43			

Once you click on the (+) icon, you can see a form which allows you to fill required fields. Save the form upon giving all the details as shown below.

Collaboration center: We can use Collaboration center to communicate between the teams on any discussion/topic/business term. Use (+) icon to create the topic and you can also assign the users to the topic.

The screenshot shows the 'View Business Term' page with the 'Collaboration Center' tab selected. The interface displays a chat history for the business term 'PerdStatsBSTM'. The chat history includes four messages from the 'Administrator' user:

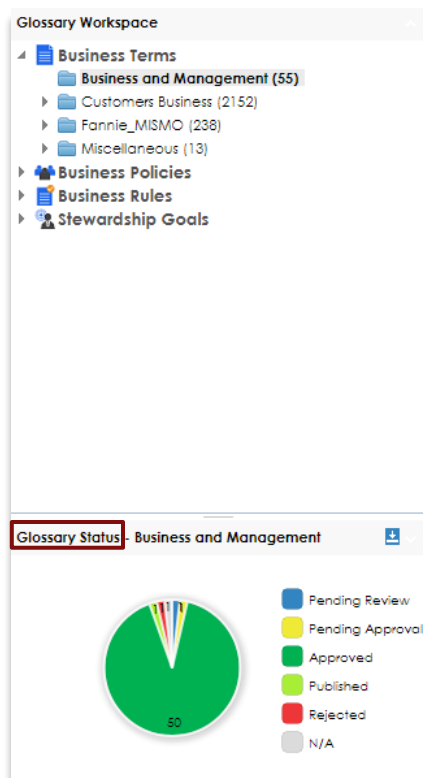
- Message 1: "hi" (24/02/2017 13:48 PM)
- Message 2: "cAN YOU REVIEW" (Yesterday 20:16 PM)
- Message 3: "Hi" (27/03/2017 20:49 PM)
- Message 4: "Hello" (27/03/2017 20:49 PM)

At the bottom of the chat history, there is a text input field labeled "Type your message" and a "SEND" button.

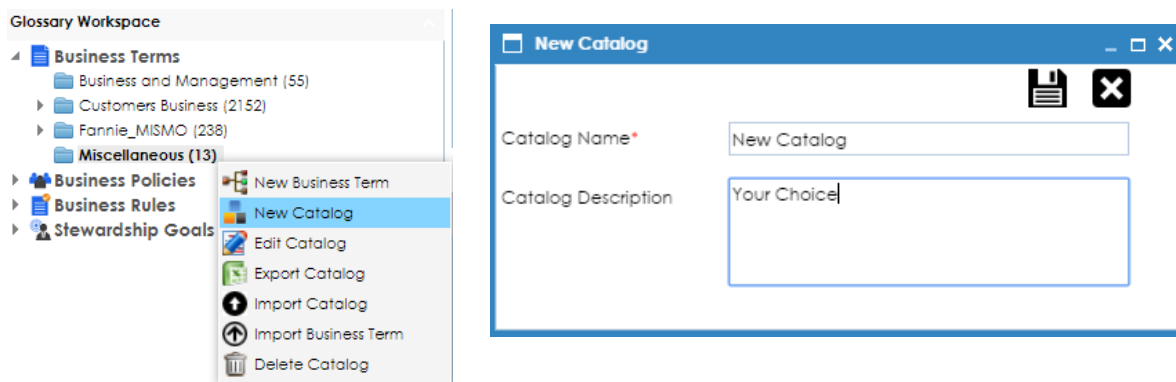
History: We can also see the History of a business term using this feature. This tells us who and when this Business Term is modified as shown in the below.

View Business Term					
Business Term Details Associations Additional Details Rich Media Library Collaboration Center History					
#	Type	Details	Date	User	
1		Status : Approved Data Steward Name : mboggs Meaning Category Type : Logical Data Collection Type : Report Data Classification Type : Master Data Object Type : Business Data Element Business Term Name : Accessibility Acronym : N	01/11/2017 17:52:30	Administrator	
2		Status : Approved Data Steward Name : mboggs Meaning Category Type : Logical Data Collection Type : Report Data Classification Type : Master Data Object Type : Business Data Element Business Term Name : Accessibility Acronym : N	01/12/2017 17:42:54	Administrator	
3		Status : Approved Data Steward Name : mboggs Meaning Category Type : Logical Data Collection Type : Report Data Classification Type : Master	01/25/2017 22:09:03	Administrator	

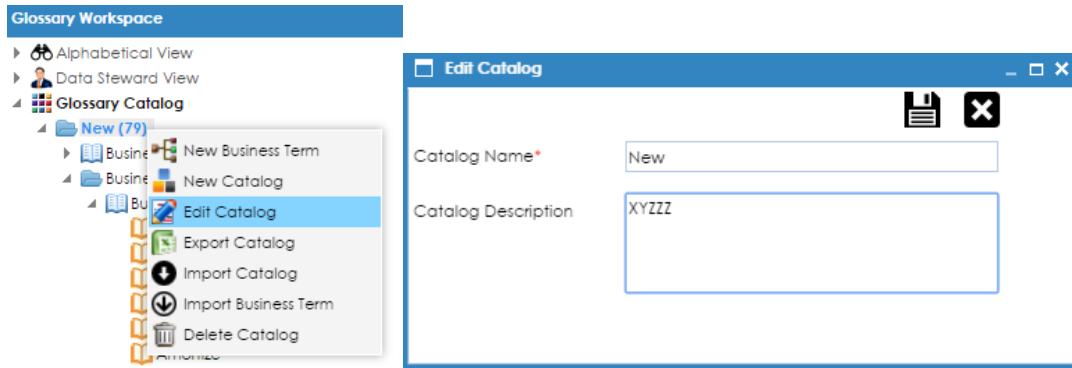
Glossary Status: We can also view the Glossary Status of a Catalog. Click on any catalog, we can see how many business terms are approved, published, rejected etc. as shown below.



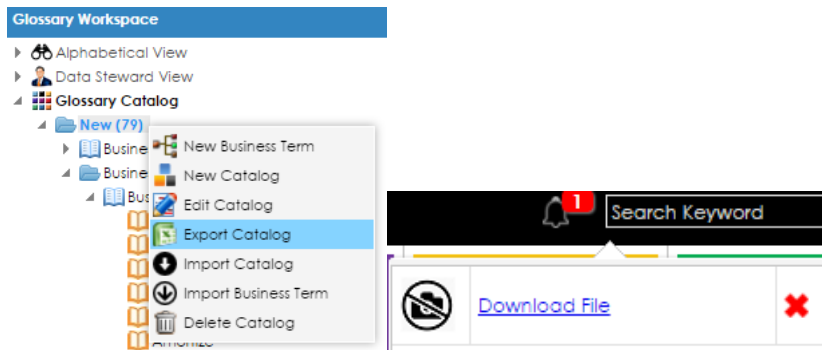
New Sub Catalog: You can also create a sub catalog under the Main Catalog. Click on New catalog and give the catalog name, description and save.



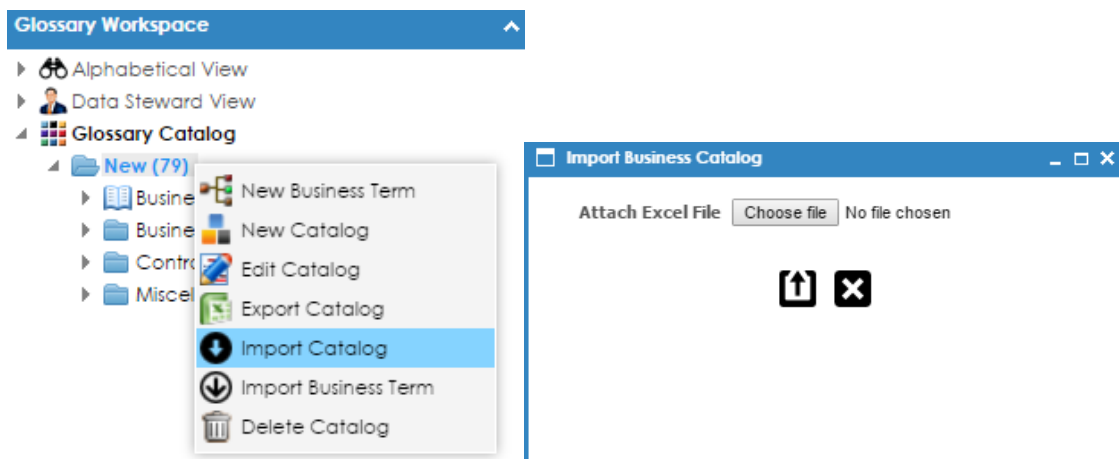
Edit Catalog: Edit your catalog by using this Edit Catalog feature and save the changes accordingly.



Export Catalog: You can also export your catalog using this Export catalog option.



Import Catalog: You can import the catalog from your existing file(s) by using this import catalog feature



Business Policies: We can also add Enterprise level business policies and associate these with the Business terms as well.

Glossary Workspace

- Business Terms
 - Business and Management (55)
 - Customers Business (2152)
 - Fannie_MISMO (238)
 - Miscellaneous (13)
- Business Policies**
 - ADS_Strategy (5)
- Business Rules
- Stewardship Goals

Business Policies Summary

#	Policy Name	Definition	Description	Catalog Name	Catalog Hierarchy	Data Steward	Associate Rules	Associate Technical Metadata	Options
1	General course of action	It is a means of putting a policy into effect within certain time limits	It is a means of putting a policy into effect within certain time limits	ADS_Strategy	ADS_Strategy		0	0	
2	Guide to action	Deals with those decisions which have not been encountered before in quite the same form, for which	Deals with those decisions which have not been encountered before in quite the same form, for which	ADS_Strategy	ADS_Strategy		0	0	
3	Policies statements	Strategies are specific actions suggested to achieve the objectives.	Strategies are specific actions suggested to achieve the objectives.	ADS_Strategy	ADS_Strategy		0	0	
4	Policy decision	It deals with crucial decisions, whose implementation requires constant attention of top management	It deals with crucial decisions, whose implementation requires constant attention of top management	ADS_Strategy	ADS_Strategy		0	0	
5	Strategic	It offers guidelines for management to follow	It offers guidelines for management to follow	ADS_Strategy	ADS_Strategy		0	0	

New catalog: Right click on the Business policies tab and click on new catalog and give your policy details. Save. Policy will be created

Glossary Workspace

- Business Terms
 - Business and Management (55)
 - Customers Business (2152)
 - Fannie_MISMO (238)
 - Miscellaneous (13)
- Business Policies**
 - ADS_Strategy (5)
- Business Rules
- Stewardship Goals

New Catalog

Catalog Name*

Catalog Description

Add Business Policy: Click on any Catalog and on the right hand side, you can see Add Business Policy option create a policy as shown below. Once we give the Business policy name and Description, we can save it accordingly.

Glossary Workspace

- Business Terms
 - Business and Management (55)
 - Customers Business (2152)
 - Fannie_MISMO (238)
 - Miscellaneous (13)
- Business Policies**
 - ADS_Strategy (5)
- Business Rules
- Stewardship Goals

Business Policies Summary

#	Policy Name	Definition	Description	Catalog Name	Catalog Hierarchy	Data Steward	Associate Rules	Associate Technical Metadata	Options
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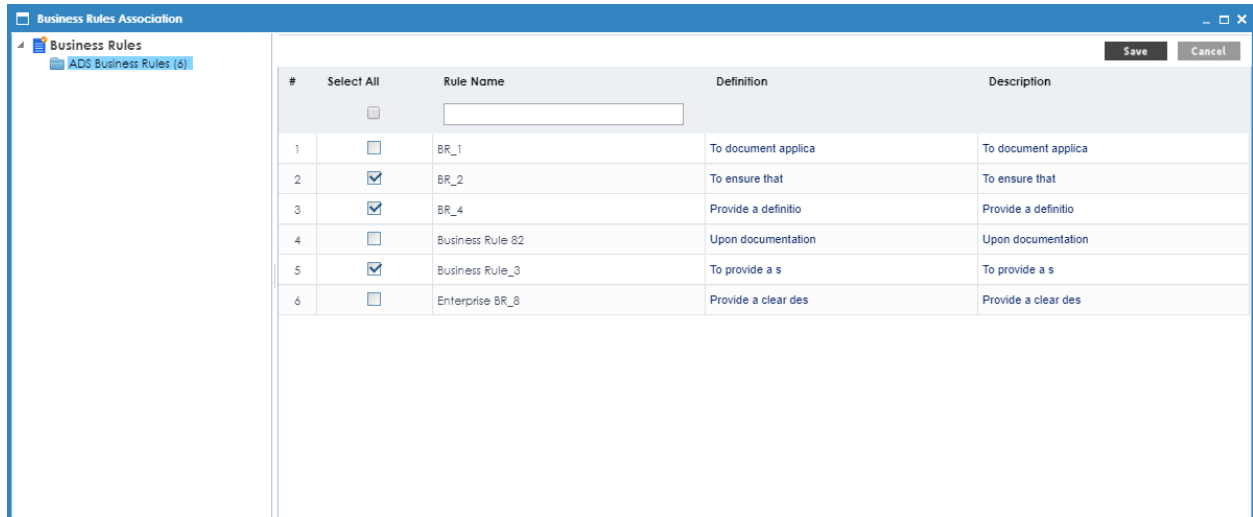
[Add Business Policy](#)

Policy Details: We can also see/edit the policy details anytime. Click on a policy to see its details including Associations, Additional information, Rich Media Library and Collaboration center. We can edit the fields if we want to make some changes to the business policy. We can also assign Data Steward to the policy and define Validity of the policy as well.

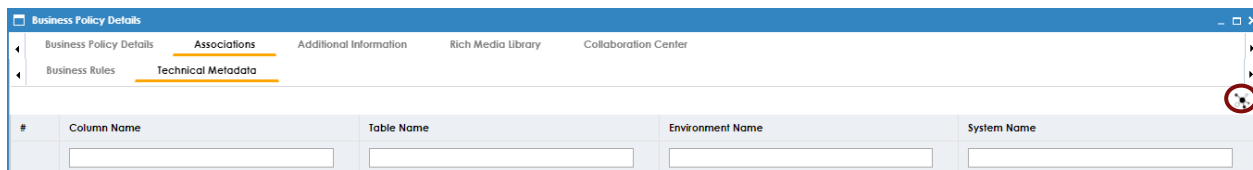
Use associate business rule option to associate business rules to the Business Policy as shown below.

#	Rule Name	Definition	Description	Catalog Name	Catalog Hierarchy	Data Steward

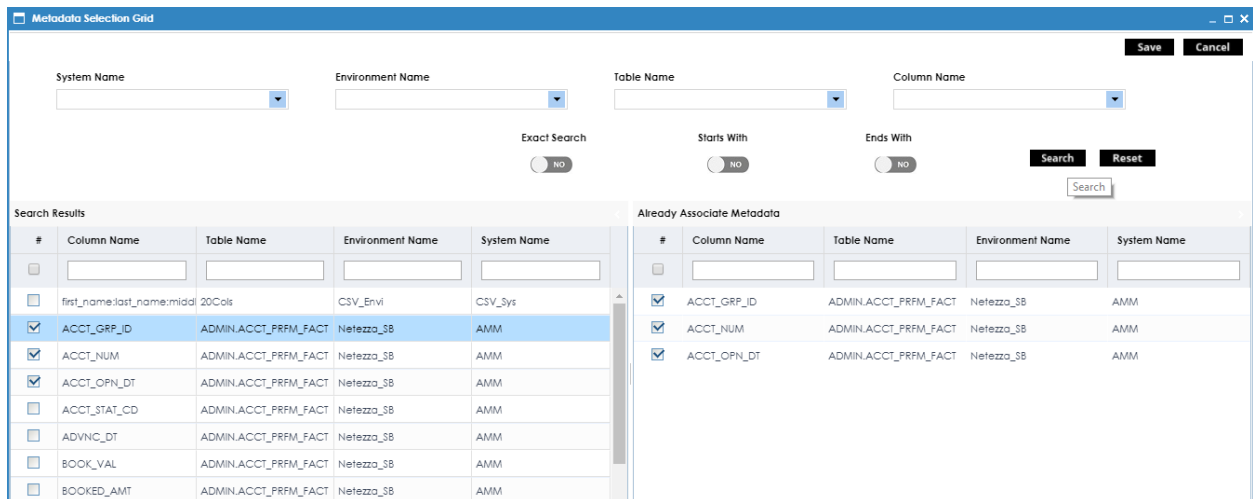
After clicking on the associate business rules option, you can see a dropdown with list of existing business rules and select your required rules as shown in the below image and save.



Associate Technical Metadata: We can use associate technical metadata to the business policy using the icon on the right side as shown below.



Once we click the icon, we can see the metadata grid as shown below. Search for the required metadata using the "search feature" and in the search results select the required metadata and save it. Now the selected metadata will get attached to the business policy.

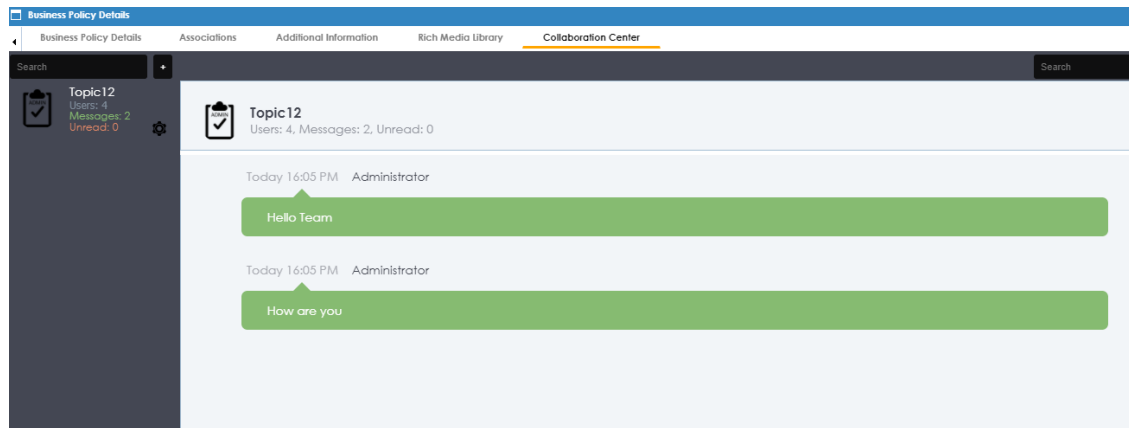


Additional Information: We can also add some additional information to the business rule. We provide ten user defined fields to give more information. You can see this in the below image.

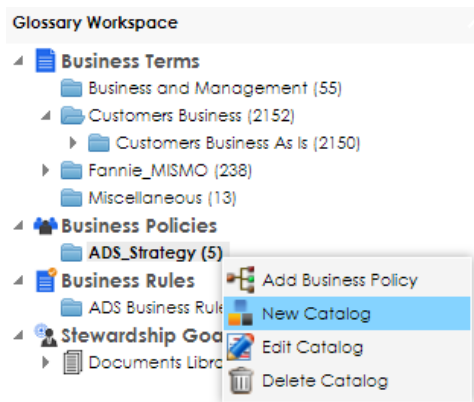
Add rich media to the Business Policy: We can use (+) icon to add any document (Audio, Video, Files). Once we attach the files we can save it accordingly.

#	Document Name	Document Description	Document Owner	Document Status	Document Type	Document Link	Created By	Created Date	Modified By	Modified Date	Preview	Edit	Delete

Collaboration center: Use collaboration center feature to create a topic and discuss between the teams. You can create a business policy topic and chat between the assigned users as shown below.



We can also add nested catalogs, edit and delete catalogs by right clicking on a Catalog as shown below.



Business Rules: We can also define the Custom Business Rules and attach these Business Rules to the Business Terms.

Glossary Workspace

- Business Terms
 - Business and Management (55)
 - Customers Business (2152)
 - Customers Business As Is (2150)
 - Fannie_MISMO (238)
 - Miscellaneous (13)
- Business Policies
 - ADS_Strategy (5)
- Business Rules
 - ADS Business Rules (6)
- Stewardship Goals
 - Documents Library

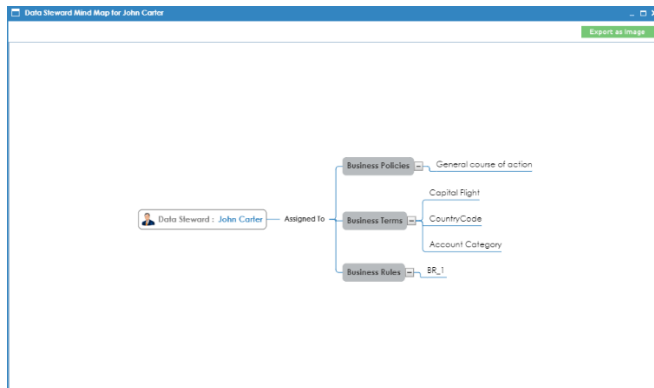
1
Catalogs

6
Business Rules

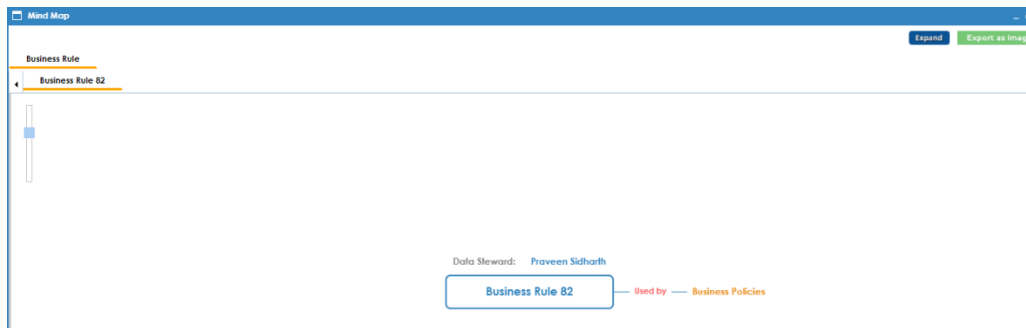
5
Data Steward

Business Rules Summary							
#	Rule Name	Definition	Description	Catalog Name	Catalog Hierarchy	Data Steward	Options
1	BR_1	To document applica	To document applica	ADS Business Rules	ADS Business Rules		
2	BR_2	To ensure that	To ensure that	ADS Business Rules	ADS Business Rules		
3	BR_4	Provide a definitio	Provide a definitio	ADS Business Rules	ADS Business Rules		
4	Business Rule_2	Upon documentation	Upon documentation	ADS Business Rules	ADS Business Rules		
5	Business Rule_3	To provide a s	To provide a s	ADS Business Rules	ADS Business Rules		
6	Enterprise.BR_8	Provide a clear des	Provide a clear des	ADS Business Rules	ADS Business Rules		

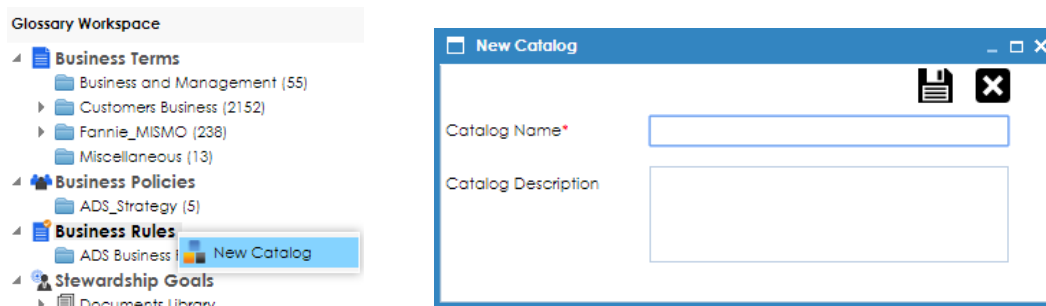
Data Steward Mindmap: We can also generate the Mind Map for a Data Steward as well. Click on any Data Steward image as shown in the above image. You can see the mind Map as shown below. Ex: John Carter You can also export this as an image as well.



Business Rule Mind Map: We can generate the mind map for a Business Rule using the Mind Map icon next to Data Steward. Click on this icon to see its dependency diagram as shown below.



Add New Catalog: You can add a catalog by right clicking on the Business Rules tab. Give the catalog name and description and save. A catalog will be created accordingly.



Add Business Rule: Click on Add Business Rule to create a new rule. Give Business rule name and description and save the Rule accordingly as shown in the below images.

The screenshot shows the Erwin Glossary Workspace interface. On the left, a tree view displays the hierarchy: Business Terms (Business and Management (55), Customers Business (2152), Fannie_MISMO (238), Miscellaneous (13)), Business Policies (ADS_Strategy (5)), Business Rules (ADS Business Rules (4)), and Stewardship Goals. A context menu is open over 'ADS Business Rules', showing options: Add Business Rule, New Catalog, Edit Catalog, and Delete Catalog. The 'Add Business Rule' option is highlighted. On the right, the 'Business Rules Summary' table is displayed. The table has columns: #, Rule Name, Definition, Description, Catalog Name, Catalog Hierarchy, Data Steward, and Options. It lists three rules: BR_1, BR_2, and BR_4. The 'Add Business Rule' button is highlighted in the top right corner of the table.

#	Rule Name	Definition	Description	Catalog Name	Catalog Hierarchy	Data Steward	Options
1	BR_1	To document applica	To document applica	ADS Business Rules	ADS Business Rules	[User Icon]	[Icons]
2	BR_2	To ensure that	To ensure that	ADS Business Rules	ADS Business Rules	[User Icon]	[Icons]
3	BR_4	Provide a definitio	Provide a definitio	ADS Business Rules	ADS Business Rules	[User Icon]	[Icons]

The screenshot shows the 'New Business Rule' dialog box. It has a 'Business Rule*' field and a 'Definition' field with a rich text editor toolbar. The 'Save' and 'Cancel' buttons are at the top right.

Once the Business Rule is created, we can go and enrich the rule if required. Use edit icon to make any changes to description, data steward, definition and notes etc.

Ex: BR_1

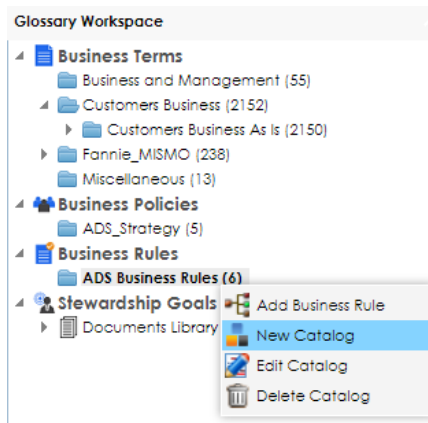
The screenshot shows the 'Business Rule Details' dialog box for rule BR_1. It has tabs for 'Business Rule Details' and 'Criteria'. The 'Business Rule Details' tab is active, showing fields for Definition, Description, and Notes. The 'Criteria' tab is also visible. The 'Data Steward' field is set to John Carter. The 'Criticality' field is set to High. The 'Tags' field is set to 'Type or click here'. The 'Edit' icon (pencil) is highlighted in the top right corner.

We can also add some additional information like Description and Type to the Business Rule as shown below. Use (+) icon to add the information.

The screenshot shows the 'Business Rule Details' dialog box for rule BR_1, with the 'Criteria' tab active. It shows a table with columns: #, Description, and Type. The table is empty, and the '(+) icon' is highlighted in the top left corner.

#	Description	Type
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We can also add Sub catalogs by right clicking on the existing catalog as shown below. We can also edit and delete the catalog.



Stewardship Goals: We can document Stewardship goals and save them in the library for the reference. Use (+) icon to add a new document form.

Glossary Workspace

#	Document Name	Document Description	Document Owner	Document Status	Docur Type	Docur Link	Cre By	Created Date	Modified By	Modified Date	Preview	Edit	Delete
1	Map Doc23		John	In Progress	xlsx		Adm	09/28/2017 15:20:40	Administrator	09/28/2017 15:20:40			
2	Goal 2	Upon documentation of application	Praveen	In Progress	xlsx		Adm	09/28/2017 15:21:18	Administrator	09/28/2017 15:21:18			
3	Quality	This claims to achieve t	M8oggs	In Progress	xlsx		Adm	09/28/2017 15:24:29	Administrator	09/28/2017 15:24:29			

We can also Preview the Document, Edit and Delete the Document as shown above.

Create a new Document: To create a new document use (+) icon and enter all the details related to the document and click save on the top right corner.

Ex: "Doc56" as shown below.

New Document Form

Document Name: Doc56

Document Owner: Mike

Document Object: Drag-n-Drop files here or click to select files for upload.

Document Description: Description of your choice

Approval Required Flag: ☒

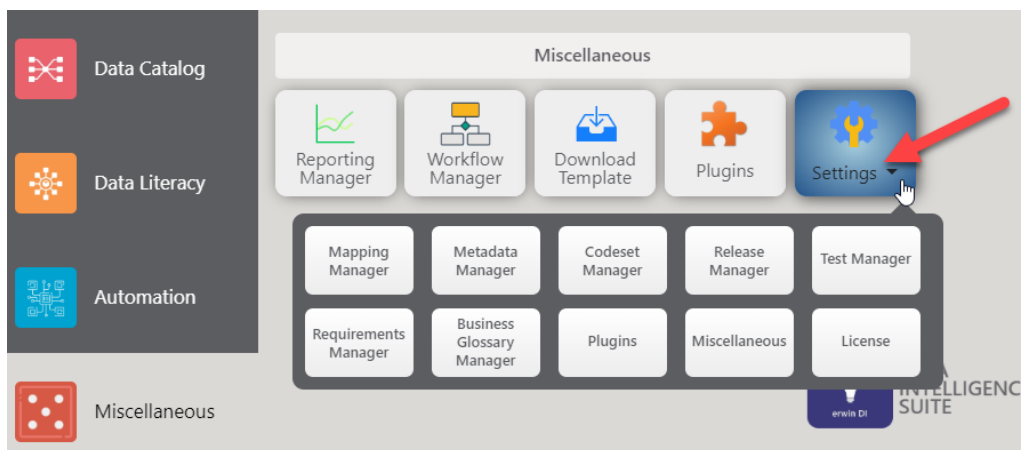
Document Status: In Progress

Save

We can also Preview, Edit and Delete the Documents.

Business Glossary Manager Settings: You can manage the view and the business term definition in the settings. Click the Settings option on the Launchpad icon as shown below. Give your required view/options and save the changes accordingly.

Click on Settings → Business Glossary Manager



Mapping Manager

Business Glossary Manager Settings

Business Glossary Manager

Classification

Master

Reference

Derived

Transactional

Operational

Glossary Status

Pending Review

Pending Approval

Approved

Published

Rejected

☒ Enable usage on Business Term

Data Object Type

Business Data Element

Data Collection

Physical Data Element

☒ Enable usage on Business Term

Data Collection Type

Report

Report Section

Screen

Dashboard

Extract

API

☒ Enable usage on Business Term

Meaning Category Type

Conceptual

Logical

Physical

Classification Options		
Key	Value	Publish
Master	Master	<input checked="" type="checkbox"/>
Reference	Reference	<input type="checkbox"/>
Derived	Derived	<input type="checkbox"/>
Transactional	Transactional	<input checked="" type="checkbox"/>
Operational	Operational	<input type="checkbox"/>

Glossary Status Options		
Key	Value	Publish
Pending Review		<input checked="" type="checkbox"/>
Pending Approval		<input checked="" type="checkbox"/>
Approved		<input checked="" type="checkbox"/>
Published		<input checked="" type="checkbox"/>
Rejected		<input checked="" type="checkbox"/>

Data Object Type Options		
Key	Value	Publish
Business Data Element	Business Data Element	<input checked="" type="checkbox"/>
Data Collection	Data Collection	<input type="checkbox"/>
Physical Data Element	Physical Data Element	<input checked="" type="checkbox"/>

Data Collection Type Options		
Key	Value	Publish
Report	Report	<input checked="" type="checkbox"/>
Report Section	Report Section	<input type="checkbox"/>
Screen	Screen	<input type="checkbox"/>
Dashboard	Dashboard	<input checked="" type="checkbox"/>
Extract	Extract	<input checked="" type="checkbox"/>
API	API	<input checked="" type="checkbox"/>

Meaning Category Type Options		
Key	Value	Publish
Conceptual	Conceptual	<input checked="" type="checkbox"/>
Logical	Logical	<input type="checkbox"/>
Physical	Physical	<input checked="" type="checkbox"/>